

RMS360 Postaward User Guide

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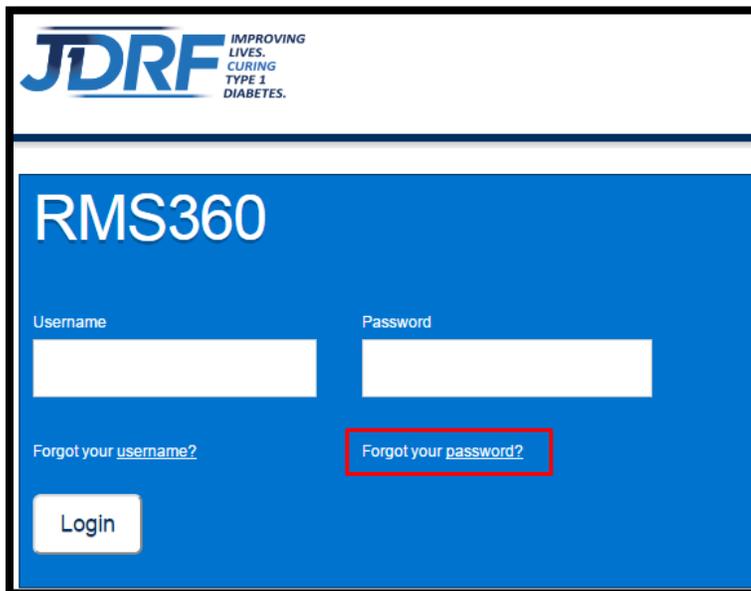
Accounts Log In and Password

1. **What's the best browser to use with RMS360?**

For the most optimal system functionality, we recommend using either **Google Chrome** or **Mozilla Firefox** as your browser when accessing RMS360.

2. **How do I reset my password?**

If you forget your password, you may reset your password from the login page of RMS360 by selecting the **"Forgot your password"** link. Your username is your email address.



3. **How do I access my username?**

If you forget your username, you may retrieve your username from the login page of RMS360 by selecting the **"Forgot your username"** link. Your username is your email address.

4. **How do I change my contact information in RMS360?**

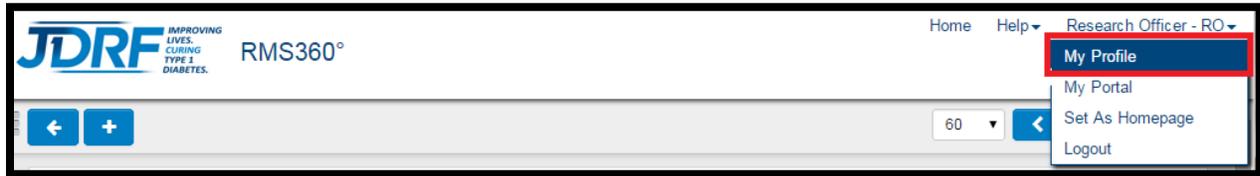
The following steps can be done by anyone who has an RMS360 login:

Step 1. Log into RMS360.

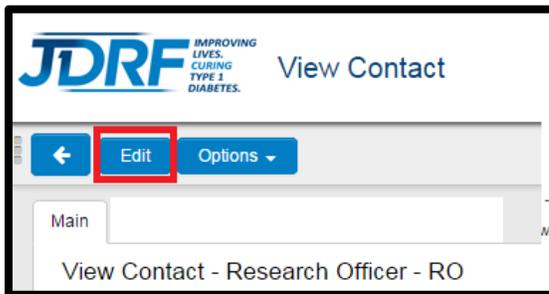
Step 2. On the home page, locate your name in the upper right-hand corner.



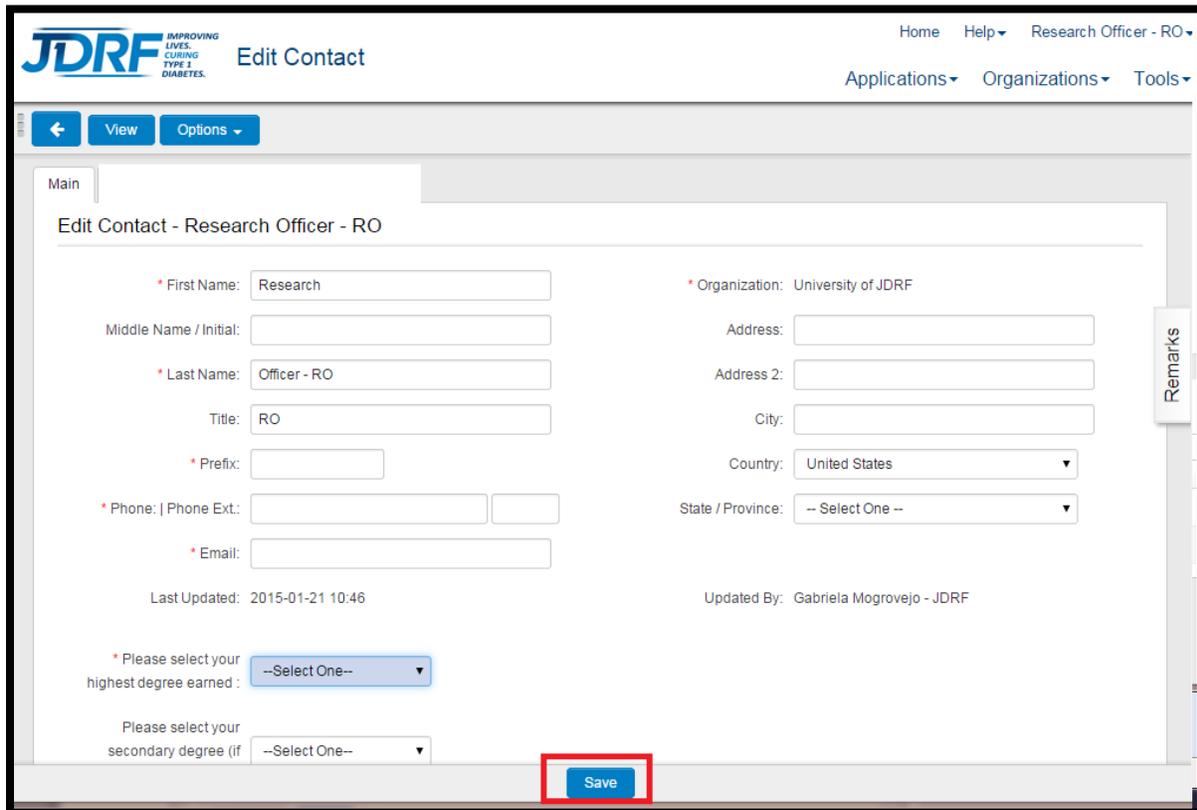
Step 3. Hover your mouse on your name and a dropdown menu will appear. Click on 'My Profile'.



Step 4. After the page refreshes, click on Edit in the upper left-hand corner.



Step 5. Make the necessary changes and click on Save at the bottom of the screen.



Roles in RMS360

- 1. What are the roles and responsibilities of the Principal Investigator (PI)/Researcher?**
 The Principal Investigator has access to all reporting materials in RMS360 for his/her grant(s). The PI may complete most sections of the activation and renewal and works with the Research Officer to formally submit to JDRF. In addition, the PI can complete and submit other reporting items in RMS360 as needed throughout the lifecycle of the award.
- 2. What are the roles and responsibilities of the Research Officer (RO)?**
 The Research Officer has access to the activation and renewals and should work with the Principal Investigator and Financial Official to complete grant activations, renewals and expenditure reports as appropriate. For other reporting items, the RO should work with the PI as needed. In addition, the individual is required to complete the payment details for activations and renewals, certify that the information is accurate, and submit the reports.
- 3. What are the roles and responsibilities of the Finance Officer (FO)?**
 The Finance Officer has access to expenditure reports for assigned grants. In this role, the individual is required to complete the expense column in the expenditure report, certify that the information included in the report is accurate, and submit the report to the Research Officer.

Activations and Renewals

1. How do I submit an Activation?

Roles: The following steps are to be completed by the PI and RO.

Step 1. The PI logs in to RMS360 and selects “Activation”, and then selects the blue ‘View/Edit’ button.

Welcome: Principal Investigator - Researcher

Panel Invitations - (0) | Closed Panels | Home | My Profile | My Expertise | Logout

[Click here to hide/show instructions]

Welcome to RMS360, JDRF International's online grants management system! If you are new to RMS360, please start by clicking on **My Profile** in the upper right corner and updating your contact information. You will also need to click on **My Expertise** to associate expertise with your profile.

Please choose a tab below to do the following:
 • begin and submit a proposal • edit a pending proposal • view your awarded grant history • submit required reports for your active JDRF grant • view your submission history with JDRF

If you have any grant-specific questions as you work within RMS360, please contact the appropriate [JDRF Pre-Award or Post-Award Staff member](#).
 For any **non grant-specific** inquiries or issues, please contact SmartSimple Support Services via email support@smartsimple.com or phone (866) 239-0991. Support hours are Monday through Friday between 5:00am and 9:00pm US Eastern Standard Time.

Instructions

Proposal Title	Grant Key	Call Name	Status	Role on Project	Activation Date	View / Edit
Type 1 Diabetes	1-SRA-2015-123	JDRF	Awaiting Activation	Principal Investigator	April-01-2015	View / Edit

Step 2. The PI completes all the information requested on each tab – Contacts, Other Support, Ethical Certifications, Milestones and Timelines and Budget. Under the Budget tab, click on ‘Add Budget’ to add, complete and save the Year 1 budget.

Welcome: Principal Investigator - Researcher

Panel Invitations - (0) | Closed Panels | Home | My Profile | My Expertise | Logout

Proposal/Grant - Type 1 Diabetes

Dates

Contacts Other Support Ethical Certifications Milestones And Timelines **Budget**

Please see the yearly approved amounts below. To view the Proposal budget submitted in the application click 'Edit/View'. You will NOT be able to edit the proposal budget. To edit the activation or renewal budget click 'Add Budget' for the associated budget period.

Year	Approved Amount	Remarks

Budget Period Created Date

Add Budget

Previous

Save Draft Validate and Submit Activation Materials to RO Delete

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Step 3. The PI clicks on the button at the bottom of the screen, “Validate and Submit Activation Materials to RO”.

Proposal/Grant - Type 1 Diabetes

Dates

Contacts Other Support Ethical Certifications Milestones And Timelines Budget

Principal Investigator Biosketch

Person who initially creates the proposal is pre-loaded as the PI. **NOTE:** The person who creates and submits the application should be the Principal Investigator (PI). Please make sure the Biosketch in your profile is up to date. You can view your profile by selecting the blue "My Profile" hyperlink on the upper right-hand corner.

Biosketch link: _____pdf

My Biosketch is up to date

Co-PI

Key Personnel

Key Personnel are defined as participants in a grant or application who contribute substantively to the scientific development or execution of a project. Key Personnel are expected to contribute a defined percentage effort on the project whether or not they draw salary support from the grant. Key Personnel will not have access to view or edit the proposal. For a Letter of Intent application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel and append it to the LOI Research Plan PDF upload. For a full proposal application, please upload a Biosketch for any faculty level collaborators listed in Key Personnel in the "Additional Attachments" section.

Add Key Personnel

Add Research Office Contact (RO) / Financial Officer (FO)

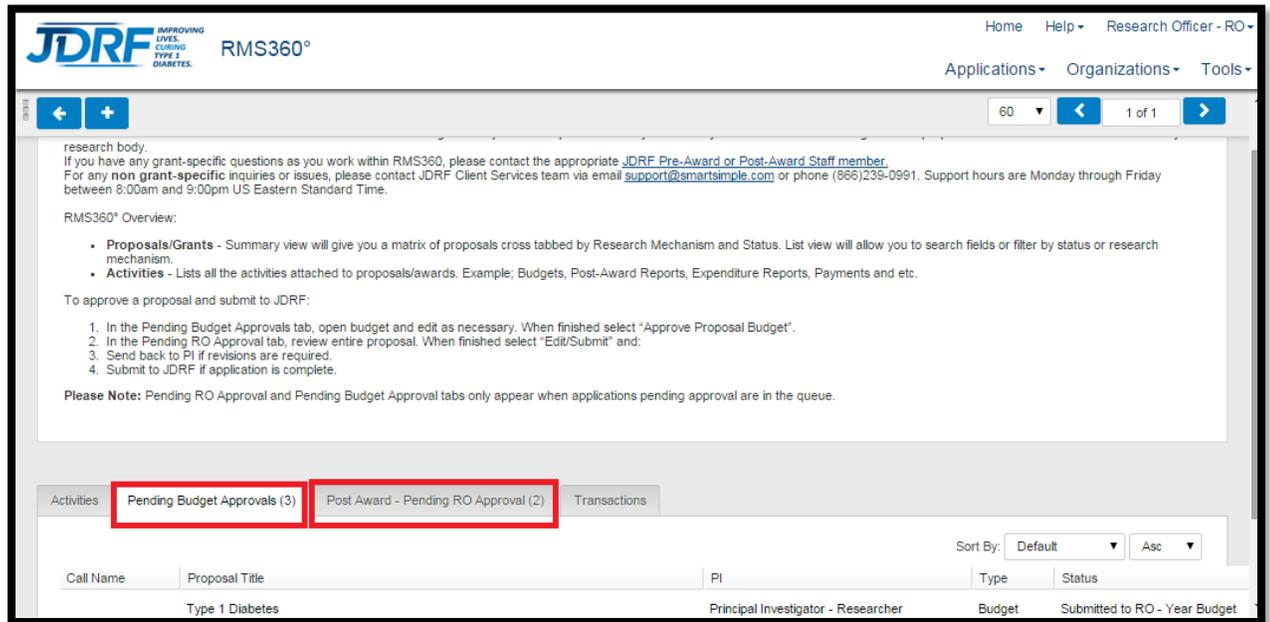
Please select the RO and FO for this proposal from the drop-down menus below and hit the "add" button. If the RO or FO for this application do not appear in the drop-down list, please use the following buttons:

Click here to create an RO **Click here to create an FO**

Save Draft **Validate and Submit Activation Materials to RO** Delete

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Step 4. The RO logs into RMS360 and completes the activation process by approving the Year 1 Budget and adding payment and audit details. See the tabs labelled, “Pending RO Approval”, “Pending Budget Approvals” and the blue Edit/Submit button.



2. For multi-year grants, what do I need to submit to renew my grant?

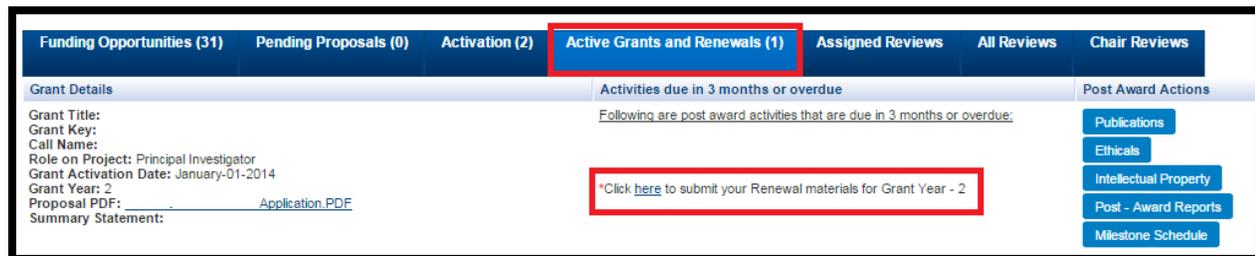
In order to renew funding for a multi-year grant, the following must be submitted:

- PI must submit an Annual Progress Report
- PI must work with the RO to submit a Renewal.
 - Note: the renewal starts in the PI’s queue.

3. How do I submit a Renewal Application?

Roles: The following steps are to be completed by the PI and RO.

Step 1. The PI logs in to RMS360 and selects “Active Grants and Renewals”



Step 2. The PI locates and clicks the applicable renewal link under “Activities due in 3 months or overdue”

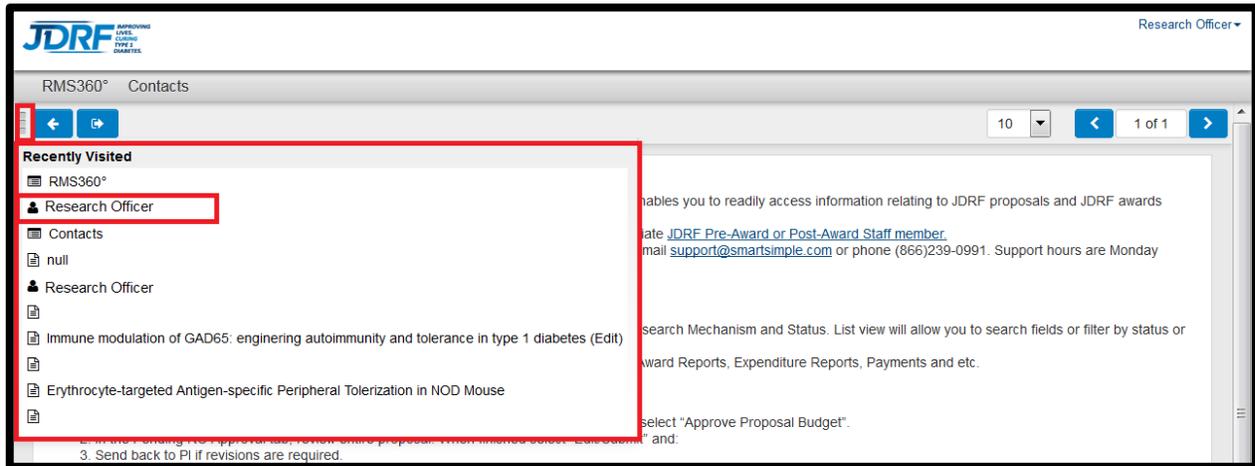
Step 3. See question, “How do I submit an Activation?”, and follow the steps starting at #2.

Payment Details

1. How do I add Payment Details?

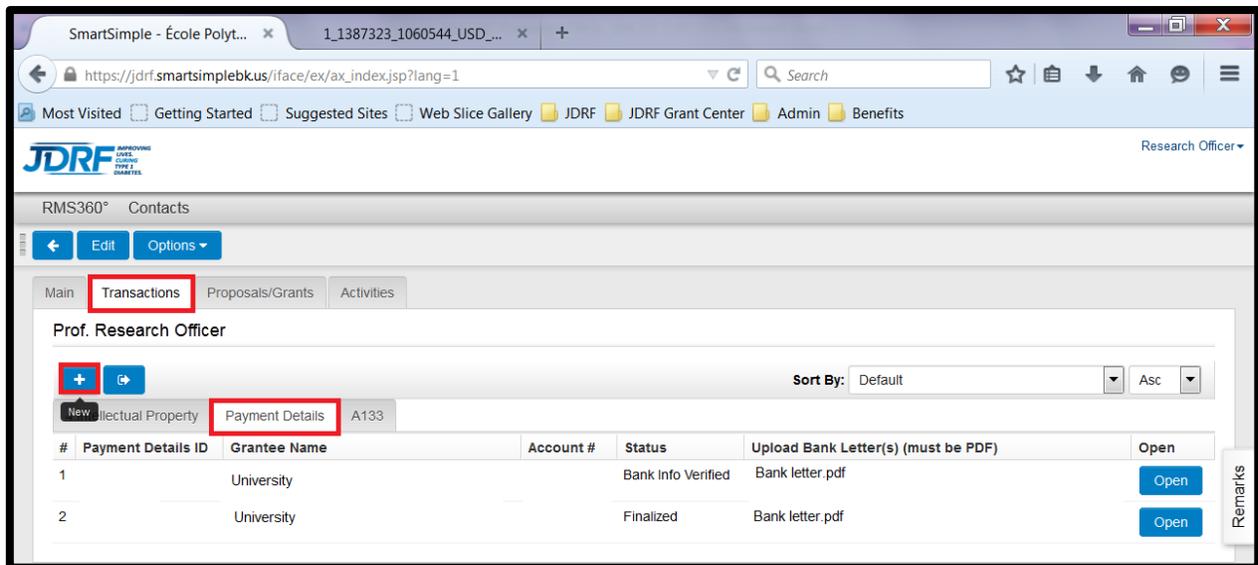
Roles: The following steps are to be completed by the Research Officer (RO).

Step 1. First, hover your mouse to the left of the blue arrow button. A dropdown menu will appear. Click on the RO name.



Step 2. Next, click on the “Transactions” tab, then the “Payment Details” tab.

Step 3. Select “New” [make sure you are clicking on the symbol, “+”]. A new window will open where you can enter new Payment Details. After you have entered these details, make sure to click “Save Draft”. After saving these details, they will be available in the dropdown under the “payment details” tab when submitting activation/renewal materials (you should see the saved details instead of “select one”).

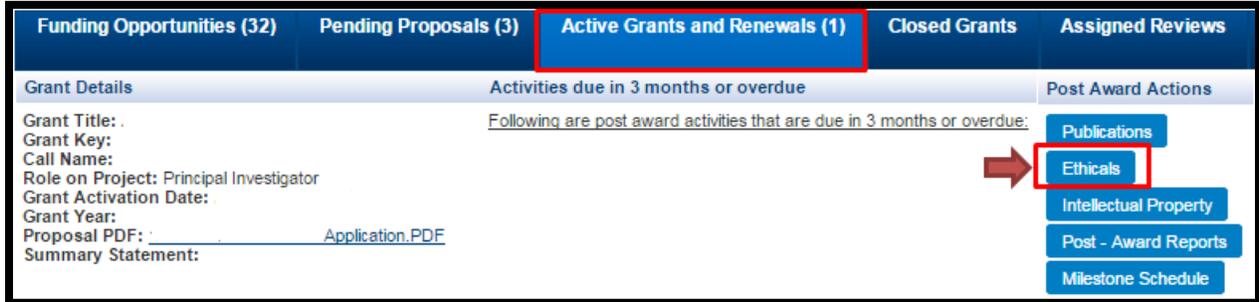


Ethicals

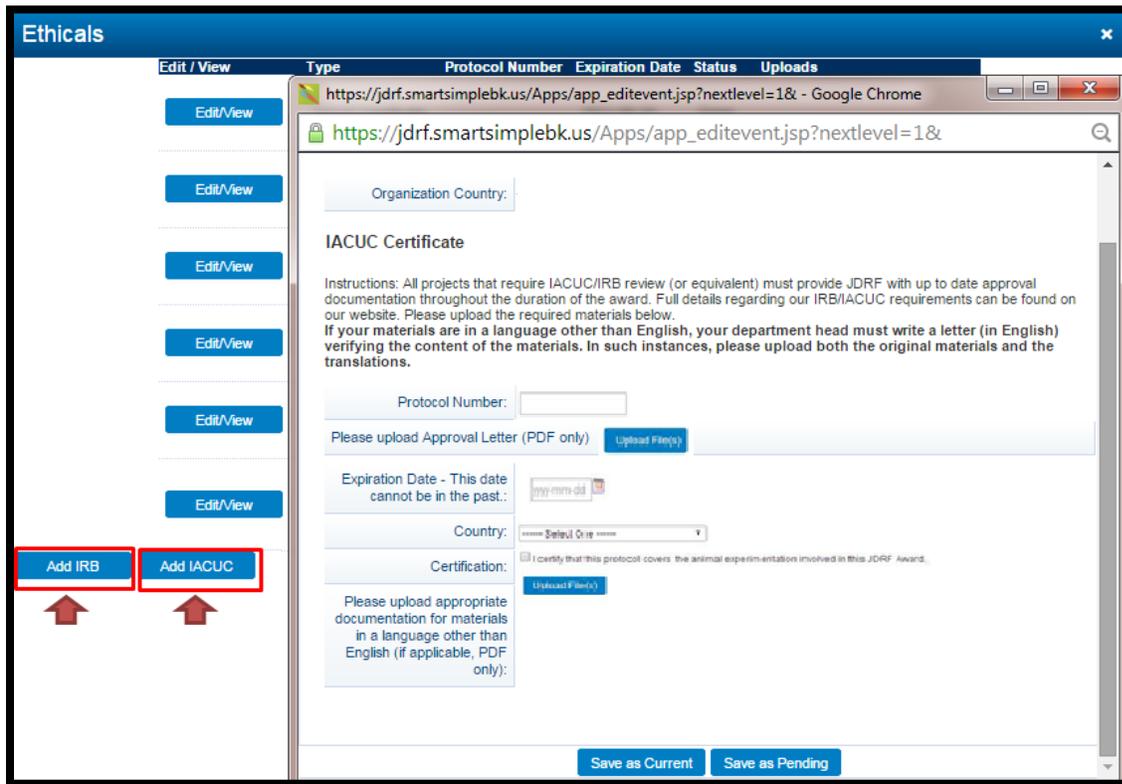
1. How do I add an Ethical?

Roles: The following steps are to be completed by the Principal Investigator (PI):

Step 1. Select the Active Grants/Renewals tab and click on the blue Ethicals button on the right.



Step 2. After you click on the ‘Ethicals’ button, a new window will open. Complete the information, Upload the File and then click on “Save as Current” to submit. [Please note: The screenshot is for the IACUC form. For the IRB form, make sure you upload the approval letter, Study Protocol/Application, and if necessary, the Informed Consent form(s)].



Terms and Conditions

- 1. How do I view the Terms and Conditions (T&Cs) of the award?**
Roles: The following steps are for the Research Officer (RO).

The terms and conditions are made available to the RO at the time of an activation or renewal, in which the RO reviews and agrees via an electronic signature to JDRF’s T&Cs. If the RO wishes to view the T&Cs after a grant has been activated or renewed, the RO must follow the steps below.

Step 1. The RO logs in to RMS360, clicks on the “Proposals/Grants” Tab and selects the award’s ‘Project Title’ to view the T&Cs.

#	Project Title	Mechanism	Institution	Status	Principal Investigator
1.	T1 Diabetes	Strategic Research Agreement (SRA)	University of JDRF	Renewal Requirements Submitted to RO	Principal Investigator - Researcher
2.	Type 1 Diabetes	Strategic Research Agreement (SRA)	University of JDRF	Activation Requirements Submitted to RO	Principal Investigator - Researcher

Step 2. Once the award page loads, the ‘Payment Details’ tab must be selected and the ‘Terms and Conditions’ can be found towards the bottom of the page.

TTO Full Name: _____ TTO Title: _____
 TTO Email: _____ TTO Phone: _____

Other Support | Ethical Certifications | Milestones And Timelines | Budget | **Payment Details**

Only the designated institutional officer may submit payment information entered in the 'Payment Details' section. The institutional officer will be the only individual allowed to submit the activation material. This will serve as 'an electronic institutional signature' in the submission process. Please note that in order to submit, the institutional official must also complete the certification box located at the bottom of this page. He or she must read and accept the terms as stated and must provide the requested contact information.

Payee Name (Check Payable to): University of _____
 Mailing Address: _____
 City: _____

Click the button below to see JDRF Terms and Conditions.

[Terms and Conditions](#)

Name: _____
 Title: _____
 Email: _____
 Telephone: _____

Upload the form appropriate for your institution/organization. A-133 Audit forms are required for US institutions that receive more than \$500,000 in federal funds. All other institutions, including international institutions, must upload a comparable recent external audit report.

Select A133 Document that is uploaded to your profile. This document will be attributed to this grant, and can be used on other grants, if any.

Milestones

1. How do I add milestones to my activation?

Roles: The following steps are for the Principal Investigator (PI).

Step 1. Log into RMS360 and navigate to the 'Activations' tab and click on the 'View/Edit' button.

Welcome: Principal Investigator - Researcher

Panel Invitations - (0) | Closed Panels | Home | My Profile | My Expertise | Logout

[Click here to hide/show instructions]

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Please choose a tab below to do the following:
 • begin and submit a proposal • edit a pending proposal • view your awarded grant history • submit required reports for your active JDRF grant • view your submission history with JDRF

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Instructions

Funding Opportunities (32)		Pending Proposals (0)		Activation (1)		Assigned Reviews		All Reviews		Chair Reviews	
Proposal Title	Grant Key	Call Name	Status	Role on Project	Activation Date	View / Edit					
Type 1 Diabetes	1-SRA-2015-123	JDRF	Awaiting Activation	Principal Investigator	April-01-2015	View / Edit					

Step 2. Once in the Activation, navigate to the 'Milestones' tab and click on the 'Add' button.

Contacts | Other Support | Ethical Certifications | **Milestones And Timelines** | Budget

Please enter your proposed milestones for the project. Each milestone should be associated with a projected completion date and, if applicable, a requested payment amount. If there is no payment amount associated with the milestones, please enter a value of '0'.
 Total Approved Amount: \$1,720,367.10

Please upload your milestone schedule document

Multiple Files... Single File...

#	File Name	Size	Date			
#	Milestone Description	Original Projected Completion Date	Revised Projected Completion Date	Status	Milestone Amount	Actions

Add

Milestones Communication Instructions

Step 3. A new window will pop up – enter the information regarding the milestone (Milestone Description, Amount, Original Projected Completion Date) and click on 'Save'.

Milestone

Please enter your proposed milestones for the project. Each milestone would reflect a task to achieve one of the project Aims, and should be associated with a target completion date and, if applicable, a requested payment amount. If there is no payment amount associated with the milestones, please enter a value of '0'.

* Milestone Description

50 words left

* Amount (\$):

Milestone Details

Scientific Aim or Project Aim

* Original Projected Completion Date:

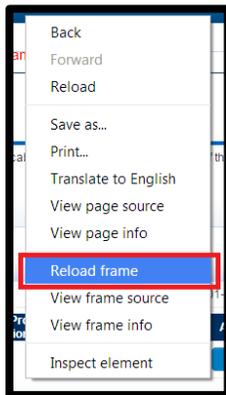
Revised Projected Completion Date:

Please upload any documentation other than the invoice

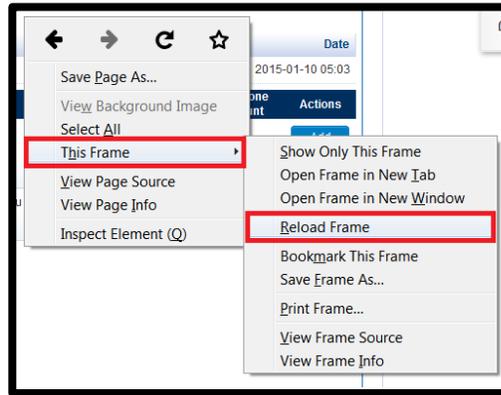
Click Save before adding attachments

Step 4. After clicking on 'Save', close the pop up window to go back to the main Activation screen.

Step 5. If using Google Chrome, right-click, then choose 'Reload Frame'. (If using Mozilla Firefox, right-click, then choose 'This Frame', then 'Reload Frame').



Google Chrome right-click menu



Mozilla Firefox right-click menu

Step 6. Navigate back to the 'Milestones' tab – you should see the milestone you just added. If edits are required, click on the blue 'Edit' button or 'Delete' if you wish to delete a milestone.

[Contacts](#)
[Other Support](#)
[Ethical Certifications](#)
[Milestones And Timelines](#)
[Budget](#)

Please enter your proposed milestones for the project. Each milestone should be associated with a projected completion date and, if applicable, a requested payment amount. If there is no payment amount associated with the milestones, please enter a value of '0'.

Total Approved Amount:

Please upload your milestone schedule document

[Multiple Files...](#)
[Single File...](#)

#	File Name	Size	Date

#	Milestone Description	Original Projected Completion Date	Revised Projected Completion Date	Status	Milestone Amount	Actions
1	Milestone Description	2016-01-01		Draft Milestone	\$10,000.00	Edit Delete
					\$10,000.00	Add

Step 7. Continue this process until all milestones are added.

Step 8. If PI needs to communicate with the JDRF Scientific Program Manager regarding milestones, the PI can use the “Milestones Communication” text box. Type the necessary communication to JDRF, then click on ‘Save Comments’, then ‘Email Comments to JDRF Scientific Staff’.

Milestones Communication Instructions

Please enter questions and comments for JDRF scientific staff. To send these comments, click “Save Comment” before you click “E mail Comments to JDRF Scientific Staff”

Milestones Communication

[Save Comments](#)
[Email Comments to JDRF Scientific Staff](#)
[Clear Comments](#)

2. How do I make changes to my milestones after my award has been activated/renewed?

Please contact the JDRF Scientific Program Manager to make any changes.

Monitoring and Reporting

1. How do I view when my reports are due?

Roles: The following steps are for the Principal Investigator (PI), Research Officer (RO), and Financial Officer (RO).

PI: The PI can view all due dates for Post-Award Reports by logging in to RMS360 and selecting “Post-Award Reports”.

[Funding Opportunities \(31\)](#)
[Pending Proposals \(0\)](#)
[Activation \(1\)](#)
[Active Grants and Renewals \(1\)](#)
[Assigned Reviews](#)
[All Reviews](#)

Grant Details | **Activities due in 3 months or overdue** | **Post Award Actions**

Grant Title: T1 Diabetes
 Grant Key: 1-SRA-2015-123
 Call Name:
 Role on Project: Principal Investigator
 Grant Activation Date: January-01-2014
 Grant Year: 1
 Proposal PDF: [Application PDF](#)
 Summary Statement:

Following are post award activities that are due in 3 months or overdue:

- [Publications](#)
- [Ethicals](#)
- [Intellectual Property](#)
- [Post - Award Reports](#)
- [Milestone Schedule](#)

Post-Award Reports

Proposal Title	Grant Key	Type	Due / Expiration Date	Status	View / Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2014	Approved	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Annual Progress Report	11/01/2015	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	03/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	06/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Quarterly Progress Report	09/01/2016	Scheduled	View/Edit
T1 Diabetes	1-SRA-2015-123	Final Progress Report	03/15/2017	Scheduled	View/Edit

RO: The RO portal does not show the report due dates as all reports are either initiated in the PI or FO portal. Instead, the RO will coordinate with the PI to be informed of the due dates for the Post-Award Reports. The RO will coordinate with the FO to be informed of the due dates for the Expenditure Reports.

FO: The FO can view all due dates for Expenditure Reports by logging in to RMS360 and selecting “Expenditure Reports”.

[Activities](#)
[Expenditure Reports \(5\)](#)
[Transactions](#)

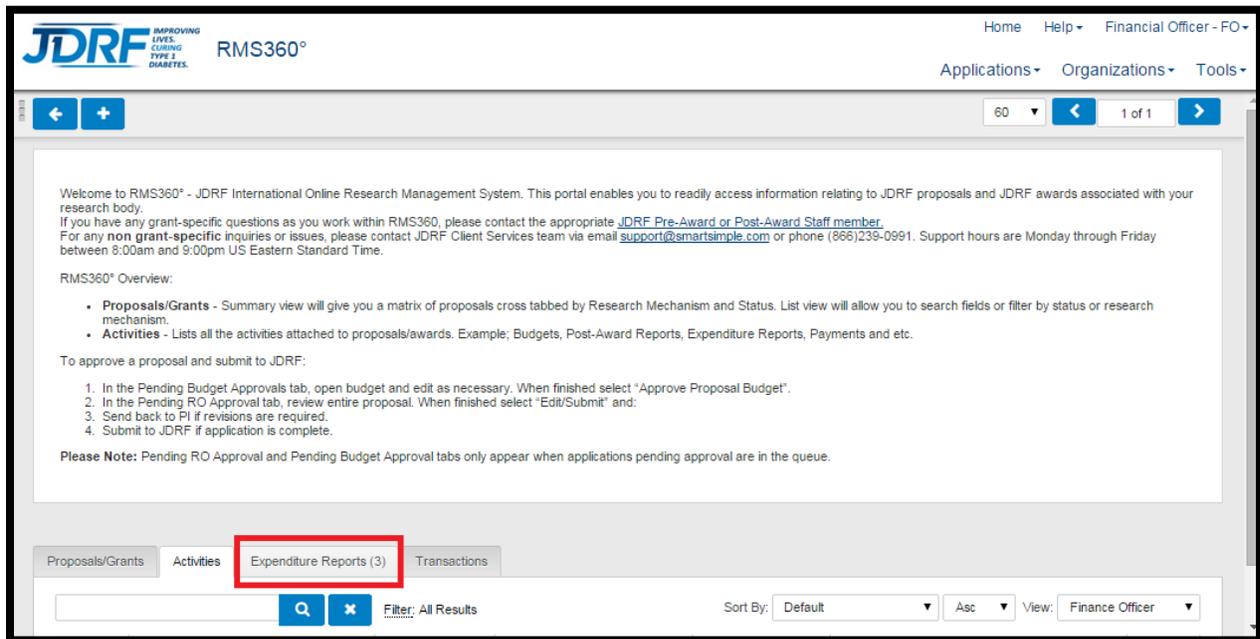
Sort By:

Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
Type 1 Diabetes	1-SRA-2015-123	1	Scheduled	2015-11-15		Open
T1 Diabetes	1-SRA-2015-123	2	Scheduled	2016-03-15		Open
Type 1 Diabetes	1-SRA-2015-123	2	Scheduled	2016-11-15		Open
T1 Diabetes	1-SRA-2015-123	3	Scheduled	2017-03-15		Open
Type 1 Diabetes	1-SRA-2015-123	3	Scheduled	2017-11-15		Open

2. How do I submit an Expenditure Report?

Roles: The following steps are to be completed by the Finance Officer (FO) and Research Officer (RO):

Step 1. Select the tab marked 'Expenditure Reports'. Click on 'Expenditure Reports':



The screenshot shows the RMS360 web application interface. At the top left is the JDRF logo with the tagline "IMPROVING LIVES. CURING TYPE 1 DIABETES." and the text "RMS360°". To the right of the logo are navigation links: "Home", "Help", and "Financial Officer - FO". Below these are "Applications", "Organizations", and "Tools". A search bar and navigation buttons are visible. The main content area contains a welcome message and instructions. At the bottom, there are tabs for "Proposals/Grants", "Activities", "Expenditure Reports (3)", and "Transactions". The "Expenditure Reports (3)" tab is highlighted with a red box. Below the tabs are search and filter controls, including a search button, a filter button, and a "Filter: All Results" label. There are also "Sort By" and "View" dropdown menus.

Step 2. A new window will pop up and you will see a list of Expenditure Reports due. Click on the blue 'Open' button to the right to open an expenditure report.

RMS360[®] Overview:

- **Proposals/Grants** - Summary view will give you a matrix of proposals cross tabbed by Research Mechanism and Status. List view will allow you to search fields or filter by status or research mechanism.
- **Activities** - Lists all the activities attached to proposals/awards. Example; Budgets, Post-Award Reports, Expenditure Reports, Payments and etc.

To approve a proposal and submit to JDRF:

1. In the Pending Budget Approvals tab, open budget and edit as necessary. When finished select 'Approve Proposal Budget'.
2. In the Pending RO Approval tab, review entire proposal. When finished select 'Edit/Submit' and:
3. Send back to PI if revisions are required.
4. Submit to JDRF if application is complete.

Please Note: Pending RO Approval and Pending Budget Approval tabs only appear when applications pending approval are in the queue.

Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	
T1D Diabetes	1-SRA-2015-123	1	Scheduled	2015-03-15		Open
T1D Diabetes	1-SRA-2015-123	2	Scheduled	2016-03-15		Open
T1D Diabetes	1-SRA-2015-123	3	Scheduled	2017-03-15		Open

Step 3. Once the ER opens, complete the form (scroll down). For any variance highlighted in red, please include a justification. For any unexpended funds, complete the Carry Forward tab. Once you are done, click on the 'Submit to RO' button at the bottom of the screen:

Activity

Expenditure Report **Carry Forward**

Category	Award Budget	Carry Forward	Total Budget	Actuals	Variance	% Variance
Personnel			\$0.00	Personnel spent in Year 3	\$0.00	0
Supplies			\$0.00	Supplies spent in Year 3	\$0.00	0
Travel			\$0.00	Travel spent in Year 3	\$0.00	0
Other Costs			\$0.00	Other costs for Year 3	\$0.00	0
Total Direct Costs	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
Indirect Costs			\$0.00	Indirect costs for Year 3	\$0.00	0
Contractual Costs			\$0.00	Contractual costs for Year 3	\$0.00	0
Equipment			\$0.00	Equipment costs for Year 3	\$0.00	0
Grand Total	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	

Please answer the question below only if you have entered amounts that are outside the allowed variance

Save Draft Submit to RO

Step 4. The RO reviews and submits the Expenditure Report to JDRF.

Budget Update

1. How do I request/submit a budget update?

Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

Step 1. The PI must email first email the JDRF Grant Administrator to request permission to complete a budget update.

Step 2. The JDRF Grant Administrator will email the PI once the budget update is created in RMS360.

Step 3. The PI logs in to RMS360 and selects “Budget Update”.

The screenshot shows the RMS360 dashboard with the following elements:

- Navigation tabs: Funding Opportunities (31), Pending Proposals (0), Activation (1), **Active Grants and Renewals (1)**, Assigned Reviews, All Reviews.
- Sub-tab: Chair Reviews
- Grant Details: Grant Title: T1 Diabetes, Grant Key: 1-SRA-2015-123, Call Name: , Role on Project: Principal Investigator, Grant Activation Date: January-01-2014, Grant Year: 1, Proposal PDF: [Application PDF](#), Summary Statement: [Application PDF](#).
- Activities due in 3 months or overdue: **Budget Update 2015-01-30 Scheduled** (highlighted with a red box).
- Post Award Actions: Publications, Ethics, Intellectual Property, Post - Award Reports, Milestone Schedule.

Step 4. The PI completes the budget update and once that is done, the PI clicks on the button at the bottom of the screen ‘Submit to RO’.

The screenshot shows the 'Budget Update' form with the following details:

- Grant Title: T1 Diabetes
- Institution: University of JDRF
- PI: Principal Investigator - Researcher
- Call Name:
- Grant Key: 1-SRA-2015-123
- Grant Year: 2 of --Select One--
- Grant Year: 2
- Organization Country: United States
- Scheduled / Due Date: 2015-01-30
- Comments from JDRF:
- Approved Amount: \$.
- Resolution Year: :
- Grant Activation Date: :
- Grant End Date: :

Budget Update	Original Year Budget
* Salaries & Wages: <input type="text"/>	Approved Salaries: \$0.00
* Supplies: <input type="text"/>	Approved Supplies : \$0.00
* Travel: <input type="text"/>	Approved Travel: \$0.00
* Other Costs: <input type="text"/>	Approved Other Costs: \$0.00
* Indirect Costs: <input type="text"/>	Approved Indirect Costs: \$0.00
* Contractual Costs: <input type="text"/>	Approved Contractual Costs: \$0.00
* Equipment: <input type="text"/>	Approved Equipment: \$0.00
Total: 0	Maximum Budget Total: \$238,155.70

Provide a detailed justification

* Upload Reallocation Request:
Please upload the reallocation request letter and any supporting documentation.

[Lookup...](#)

Buttons: [Save Draft](#), **[Submit to RO](#)** (highlighted with a red box)



Step 5. The RO logs into RMS360, selects 'Post-Award – Pending RO Approval, and 'Opens' the budget update.

Activities	Pending Termination Approval (1)	Pending Budget Approvals (2)	Post Award - Pending RO Approval (3)	Transactions			
Type	Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date	Sort By: Default Asc
Budget Update	Type 1 Diabetes	1-SRA-2015-123	2	Submitted to RO	2015-01-30		Open

Step 6. The RO reviews the budget update. If revisions are required, click on the button at the bottom of the screen, "Send back to PI". If acceptable, click "Submit to JDRF".

Grant Title: Type 1 Diabetes

Institution: University of JDRF
PI: Principal Investigator - Researcher
Call Name: Strategic Research Agreement
Grant Key: 1-SRA-2015-123
Grant Year: 2 of 3

Approved Amount: \$
Resolution Year:
Grant Activation Date:
Grant End Date:.

Grant Year: 2
Organization Country: United States
Scheduled / Due Date: 2015-01-30

Budget Update	Original Year Budget
* Salaries & Wages: <input type="text"/>	Approved Salaries: \$0.00
* Supplies: <input type="text"/>	Approved Supplies: \$0.00
* Travel: <input type="text"/>	Approved Travel: \$0.00
* Other Costs: <input type="text"/>	Approved Other Costs: \$0.00
* Indirect Costs: <input type="text"/>	Approved Indirect Costs: \$0.00
* Contractual Costs: <input type="text"/>	Approved Contractual Costs: \$0.00
* Equipment: <input type="text"/>	Approved Equipment: \$0.00
Total:	Maximum Budget Total: \$

Provide a detailed justification

No-Cost Extensions

1. How do I submit a No-cost Extension (NCE)?

Roles: The following steps are to be completed by the PI and the RO.

Step 1. A No-Cost Extension link will appear in the PI portal 90 days prior to the grant end date. If the PI does not see the link, contact the JDRF Grant Administrator and notify them that you do not see the link.

Step 2. The link for an NCE request is located under *Active Grants and Renewals* tab under the “Activities due in 3 months or overdue” column. The due date will also appear next to the link.

The screenshot shows a navigation bar with tabs: Funding Opportunities (31), Pending Proposals (0), Activation (2), **Active Grants and Renewals (1)**, Assigned Reviews, All Reviews, and Chair Reviews. Below the navigation bar, there are sections for Grant Details, Activities due in 3 months or overdue, and Post Award Actions. The 'No Cost Extension 2015-01-31 Scheduled' link is highlighted with a red box.

Step 3. PI Completes Web Progress Report and No-cost Extension fields and clicks “Submit to RO”

The screenshot shows the 'No Cost Extension' form. It includes fields for Institution, PI, Call Name, Grant Key, Grant Year, Organization Country, and Scheduled / Due Date. There are sections for downloading and uploading NCE Progress and Expenditure Reports. At the bottom, there are buttons for 'Save Draft' and 'Submit to RO', with the latter highlighted by a red box. A red arrow points to the 'No Cost Extension' section.

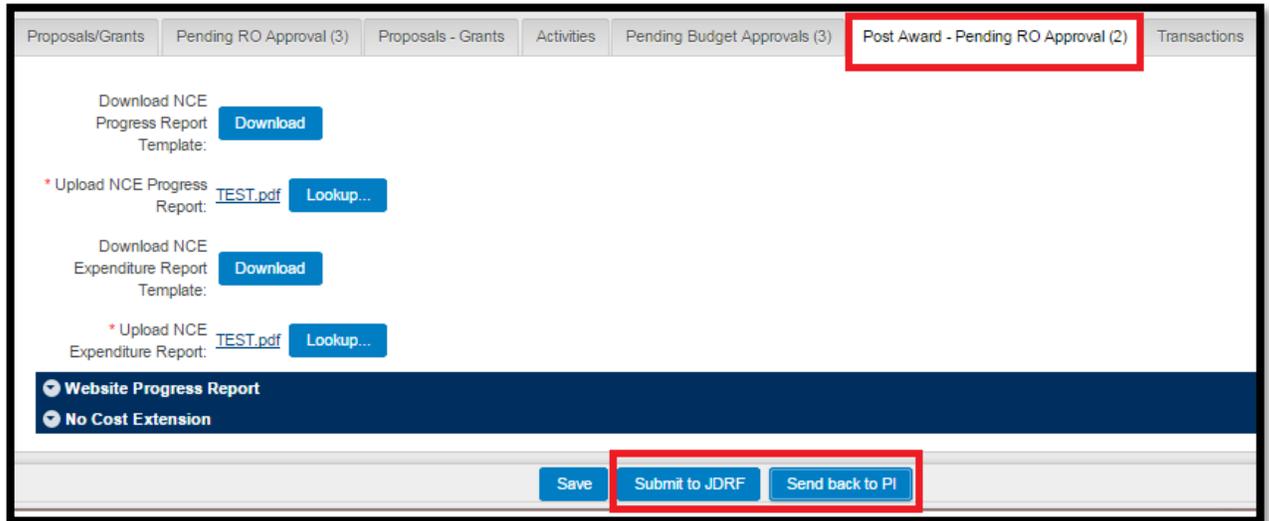
The following steps are to be completed by the Research Officer (RO):

Step 4. Select the *Post Award-Pending RO Approval* tab and click “Open”

The screenshot shows a navigation bar with tabs: Proposals/Grants, Pending RO Approval (3), Proposals - Grants, Activities, Pending Budget Approvals (3), **Post Award - Pending RO Approval (2)**, and Transactions. Below the navigation bar, there is a table with columns: Type, Proposal Title, Grant Key, Grant Year, Status, Scheduled / Due Date, and Approved Date. The 'Open' button is highlighted with a red box.

Type	Proposal Title	Grant Key	Grant Year	Status	Scheduled / Due Date	Approved Date
No Cost Extension	T1D Diabetes	1-SRA-2015-123	2	Submitted to RO	2015-01-31	

Step 5. Review the Web Progress Report and No-cost Extension information. If revisions are required, click “Send back to PI”. If acceptable, click “Submit to JDRF”.



Step 6. No-cost Extension Request has been submitted successfully.

Transfers

1. How do I request a transfer?

Roles: The following steps are to be completed by the Principal Investigator (PI).

Step 1. The PI must first email the JDRF Grant Administrator and request a transfer as soon as the PI becomes knowledgeable of his/her transfer.

Step 2. The JDRF Grant Administrator will email the PI with further instructions and steps to initiate the transfer.

Step a. The PI will need to complete a Termination activity in RMS360 for the former institution.

Step b. The PI will need to submit a Transfer application under the new institution.

Transition

1. How do I request a transition?

Roles: The following steps are to be completed by the Principal Investigator (PI).

Step 1. The PI must first email the JDRF Grant Administrator to request a transition award, as soon as the PI becomes knowledgeable of his/her new faculty appointment.

Step 2. The JDRF Grant Administrator will email the PI with further instructions and steps to initiate the transition, if approved.

Step a. The PI will need to complete a Termination activity in RMS360 for the former institution.

Step b. The PI will need to submit a Transition application under the new institution.

Termination

1. How do I complete the termination activity?

Roles: The following steps are to be completed by the Principal Investigator (PI) and Research Officer (RO).

- Step 1.** The PI must first email the JDRF Grant Administrator to initiate a termination.
- Step 2.** The JDRF Grant Administrator will email the PI once the termination activity is created in RMS360.
- Step 3.** The PI logs in to RMS360 and selects “Termination”.

The screenshot shows the RMS360 dashboard with the following elements:

- Navigation tabs: Funding Opportunities (31), Pending Proposals (0), Activation (1), **Active Grants and Renewals (1)**, Assigned Reviews, All Reviews.
- Sub-sections: Chair Reviews, Grant Details, Activities due in 3 months or overdue, Post Award Actions.
- Grant Details: Grant Title: T1 Diabetes, Grant Key: 1-SRA-2015-123, Call Name, Role on Project: Principal Investigator, Grant Activation Date: January-01-2014, Grant Year: 1, Proposal PDF, Summary Statement.
- Activities due in 3 months or overdue: **Termination 2015-01-30 Scheduled** (highlighted with a red box).
- Post Award Actions: Publications, Ethicals, Intellectual Property, Post - Award Reports, Milestone Schedule.

- Step 4.** The PI completes the termination and once that is done, the PI clicks on the button at the bottom of the screen, ‘Submit to RO’.

The screenshot shows the RMS360 termination form with the following elements:

- Form fields: Grant Year: 2, Organization Country: United States, Scheduled / Due Date: 2015-01-30.
- Comments from JDRF: * Termination Date: [yyyy-mm-dd] [calendar icon]
- Radio buttons:
 - * Has the PI expressed a desire to continue his/her research project at another institution: No, Yes
 - * Is your award in the last year?: Yes, No
- Text: University of JDRF will terminate award 1-SRA-2015-123 as of date specified above and agrees to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of that date. The estimated unexpended balance on the above-specified termination date calculated on the basis of total amount awarded for the current grant year is:
- Form fields: * Direct Cost: [input], * Indirect Cost: [input], Total Cost: \$0.00
- Text: The portion of the estimated unexpended balance which has been received by our Institution will be returned to JDRF, with final adjustment if required, upon submission of the final expenditure report due 60 days after date specified above. In no circumstance should the final adjustment denote an unexpended balance less than \$0.00. In such event, we acknowledge that our Institution is responsible for the balance. In the event of an approved transfer of an award to another institution, the equipment necessary for the continuation and success of the project will be transferred to the new grantee institution and title vested in the new institution for use by the designated principal investigator and personnel listed on the project. Use of JDRF funds for costs associated with the transfer of equipment is unallowable. The following equipment costing \$5,000 or more transferring with the project are listed below.
- Buttons: Add Equipment, Save Draft, **Submit to RO** (highlighted with a red box).

- Step 5.** The RO logs into RMS360, selects ‘Pending Termination Approval’, and ‘Opens’ the Termination.

Activities	Pending Termination Approval (2)	Pending Budget Approvals (2)	Post Award - Pending RO Approval (2)	Transactions
Call Name	Proposal Title	PI	Activity Type	Status
	T1 Diabetes	Principal Investigator - Researcher	Termination	Submitted to RO
				Open

Step 6. The RO reviews the termination, and then clicks on the button at the bottom of the screen, 'Submit to JDRF'.

Type: Termination
 Status: Submitted to RO
 Created/Submitted By: Principal Investigator - Researcher
 Created Date: 2018-01-02

Grant Year: 2
 Organization Country: United States
 Scheduled / Due Date: 2018-01-30
 Termination Date: [calendar icon]

Has the PI expressed a desire to continue his/her research project at another institution?
 No
 Yes

Is your award in the last year?
 Yes
 No

University of JDRF will terminate award #DRN-00 (if 12 as of date specified above and agrees to relinquish all claims to any unexpended and uncommitted funds remaining in the grant as of final date. The estimated unexpended balance on the above-specified termination date calculated on the basis of total amount awarded for the current grant year is:

Direct Cost: [input]
 Indirect Cost: [input]
 Total Cost: \$0.00

The portion of the estimated unexpended balance which has been received by our institution will be returned to JDRF, with final adjustment if required, upon submission of the final expenditure report due 60 days after date specified above. In no circumstance should the final adjustment denote an unexpended balance less than \$0.00. In such event, we acknowledge that our institution is responsible for the balance. In the event of an approved transfer of an award to another institution, the equipment necessary for the continuation and success of the project will be transferred to the new grantee institution and the assets in the new institution for use by the designated principal investigator and personnel listed on the project. Use of JDRF funds for costs associated with the transfer of equipment is unallowable. The following equipment costing \$5,000 or more transferring with the project are listed below:

Add Equipment

I am the individual identified below and am authorized on behalf of my institution to submit to JDRF the request for award termination.

Authorized signing official full name: [input]
 Authorized signing official title: [input]
 Institutional Email Address: [input]
 Execution date: [calendar icon]

Buttons: Save, **Submit to JDRF**, Send back to PI

Intellectual Property

1. How do I add Intellectual Property?

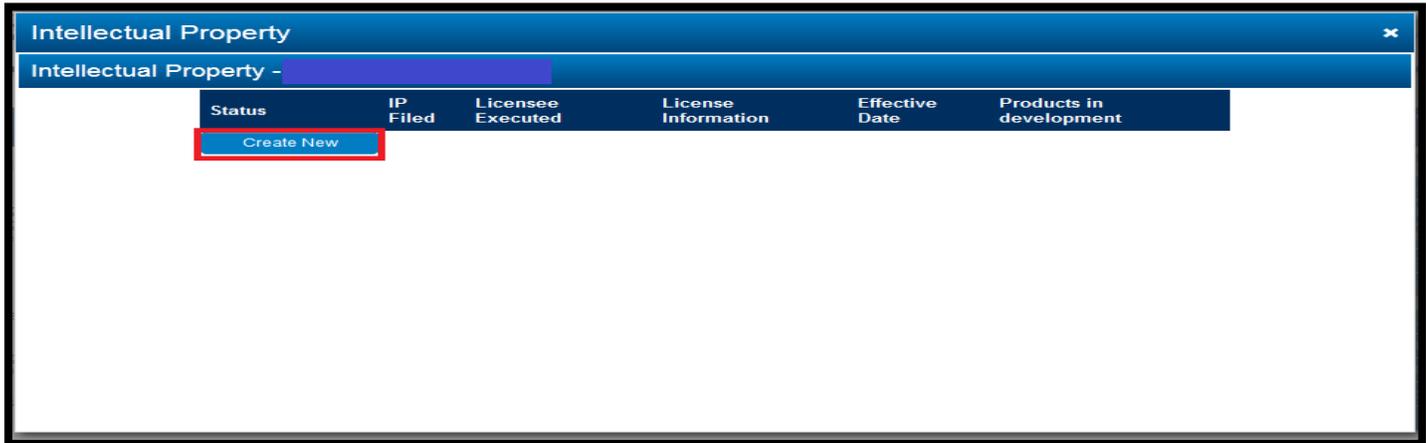
Roles: The following steps are to be completed by the Principal Investigator (PI) or Research Officer (RO).

Principal Investigator:

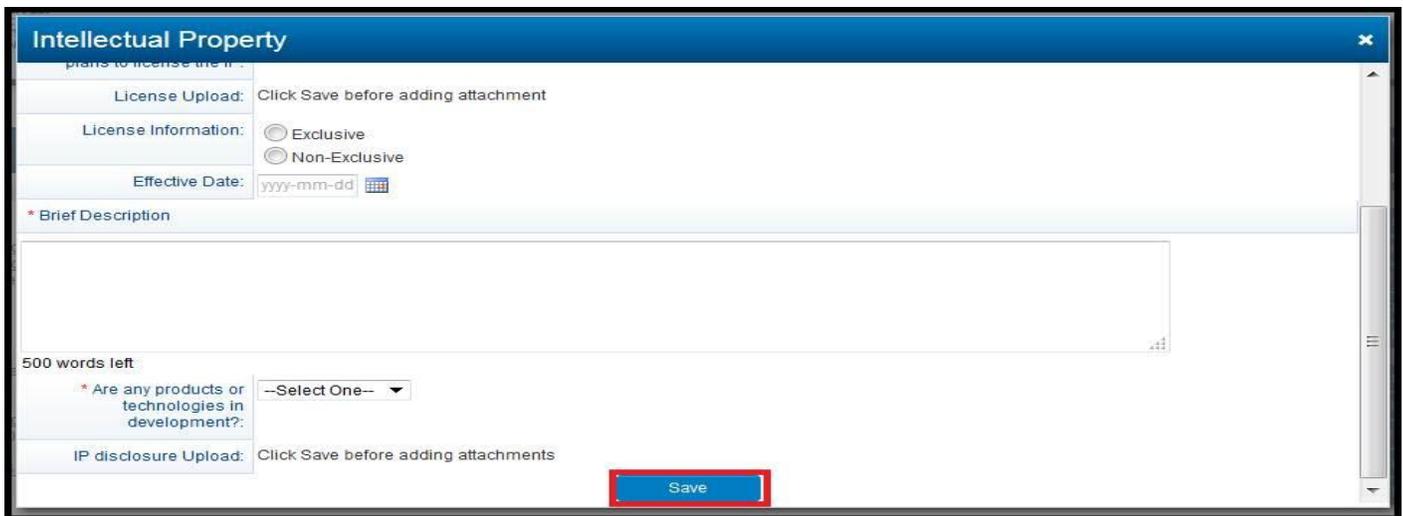
Step 1. The PI logs in to RMS360 and selects "Intellectual Property".

Funding Opportunities (30)	Pending Proposals (3)	Activation (3)	Active Grants and Renewals (2)	Closed Grants	Assigned Reviews	All Reviews	Chair Reviews
Grant Details				Activities due in 3 months or overdue		Post Award Actions	
Grant Title: Grant Key: Call Name: Strategic Research Agreement (SRA) - Role on Project: Principal Investigator Grant Activation Date: September-01-2014 Grant Year: 2 Proposal PDF: Proposal Summary Statement:				Following are post award activities that are due in 3 months or overdue: Quarterly Progress Report 2015-05-01 Scheduled IRB Certificate 2015-04-30 Current		Publications Ethicals Intellectual Property Post - Award Reports Milestone Schedule	

Step 2. A new window will open where you can select the ‘Create New’ button



Step 3. The PI will complete the required fields, and once complete, the ‘save’ button should be selected at the bottom of the screen.



Step 4. Once the required files have been uploaded, the PI will select the submit button to formally submit to JDRF.

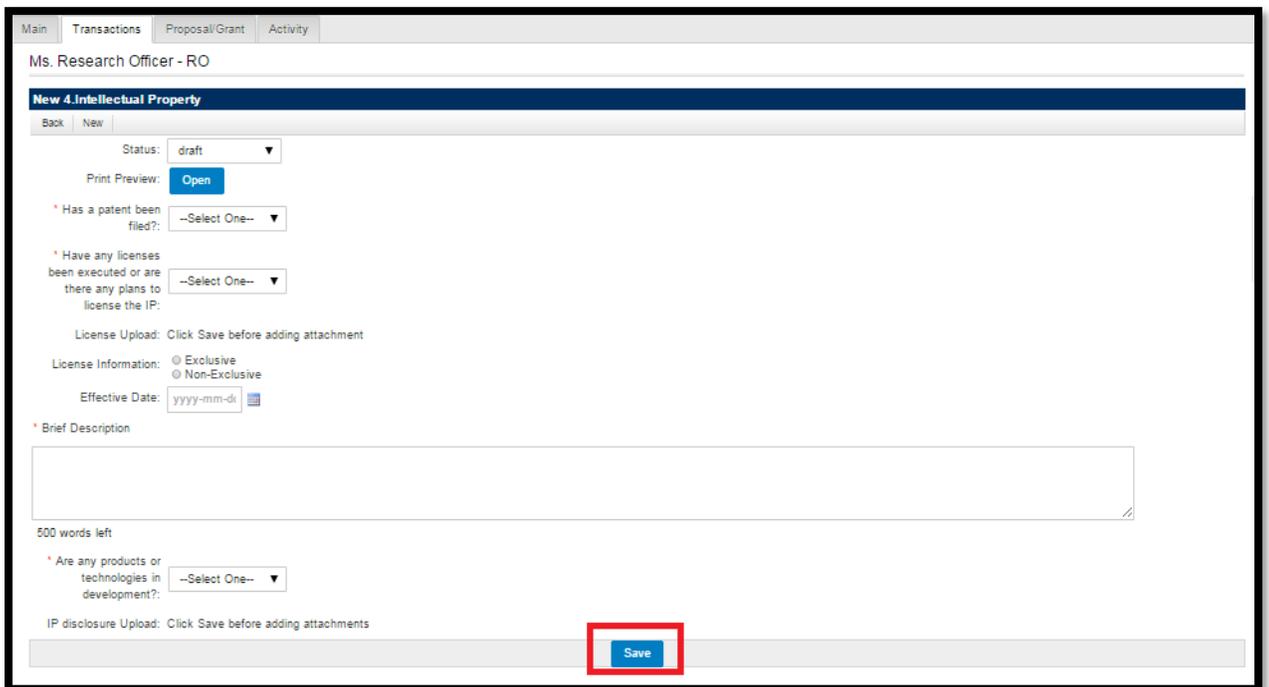


Research Officer:

Step 1. The RO logs in to RMS360 and selects “Transactions” under *My Profile* link. Under the Intellectual Property tab, select “New” to add details [make sure you are clicking on the symbol, “+”].



Step 2. The RO will complete the required fields, and once complete, the ‘save’ button should be selected at the bottom of the screen.



Step 3. Once the required files have been uploaded, the RO will select the submit button to formally submit to JDRF.

The screenshot shows a web form titled "Edit 4. Intellectual Property". At the top left, there are links for "View List" and "New". The form contains several sections:

- Status:** A dropdown menu set to "Draft".
- Print Preview:** A blue "Open" button.
- Has a patent been filed?:** A dropdown menu set to "Yes".
- Patent Information:** A blue "Add Patent" button.
- Have any licenses been executed or are there any plans to license the IP?:** A dropdown menu set to "No".
- License Upload:** A blue "Lookup..." button.
- License Information:** Radio buttons for "Exclusive" and "Non-Exclusive", with "Non-Exclusive" selected.
- Effective Date:** A text input field with a date picker icon, containing "yyyy-mm-dd".
- Brief Description:** A large text area containing "n/a". Below it, it says "499 words left".
- Are any products or technologies in development?:** A dropdown menu set to "Yes".
- Add Products:** A blue "Add Products" button.
- IP disclosure Upload:** Two buttons: "Multiple Files..." and "Single File...".

At the bottom of the form, there is a horizontal bar with five buttons: "Save", "Copy", "Submit", "Links", and "Delete". The "Submit" button is highlighted with a red rectangular border.